CALHR
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES
Statewide Workforce Planning and Recruitment

Workforce Data Analysis Methodology

FACTOR	WORKFORCE DATA	DEFINITION	EQUATION	EXAMPLE CALCULATION	RATIONALE
Retirement Factor (RF)	Service and disability retirements	The Retirement Factor (RF) is the proportion of employees (EE) in a classification lost to both service and disability retirements during the last twelve months.	RF = r/t Where *r* is the total retirements in the last twelve months, and *t* is the total employees in the classification during the last twelve months.	12 retired/110 EE = 10.9%	The state's workforce planning priorities have primarily focused on the expected increase of retirements as many state employees reach retirement age. The RF provides the data to show the impact of retirements on staffing for each classification. A relatively high RF may signal an increased need for succession planning strategies.
Transfer Factor (TF)	Lateral transfers to other departments in state government	The Transfer Factor (TF) is the proportion of employees (EE) in a classification that laterally transferred to another department in the state government during the last twelve months.	TF = l/t Where *l* is the total lateral transfers in the last twelve months, and *t* is the total employees in the classification during the last twelve months.	6 transfers/110 EE = 5.5%	Lateral transfers between departments are a common separation at the state. Employees who laterally transfer take their departmental training and expertise with them to another department. A relatively high TF may signal an increased need for retention strategies.
Separations Factor (SF)	Voluntary separations from state service	The Separations Factor (SF) is the proportion of employees (EE) in a classification that voluntarily separated from state government during the last twelve months.	SF=v/t Where *v* is the total voluntary separations in the last twelve months, and *t* is the total employees in the classification during the last twelve months	3 voluntary/110 EE = 2.7%	Voluntary separations from state service especially impact classifications with training and skills that apply to higher paying positions in the private sector or federal and local governments. Given the changing attitudes about career longevity seen in younger generations, this factor may have greater impact in years to come. A relatively high SF may signal an increased need for recruitment and/or retention strategies.

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Actual Impact (AI)	Takes into account all the above separations during the last twelve months.	The Actual Impact (AI) is the average proportion of the classification that was lost to separations during a given year. The AI is a relatively stable metric of the proportion of employees that can be expected to separate from the classification.	AI = (RF+TF+SF)/3 Where *RF* is the retirement factor percentage, *TF* is the transfer factor percentage, and *SF* is the separations factor percentage in the last twelve months.	(10.9+5.5+2.7)/3 = 6.4%	The AI calculation is used to prioritize classifications which experience a relatively greater impact due to separations in general. A relatively high AI is a signal to look more closely at the particular separation type(s) that are common in the classification and develop strategies to address the risks posed by those separation(s).
Potential Impact (PI)	Takes into account current vacancies, retirement age employees, and recruitment.	The Potential Impact (PI) projects the percentage of the classification that could become vacant due to retirements and lack of recruiting efforts in the coming year.	PI = (vp+ra-re)/ep Where *vp* is the total of current vacancies, *ra* is the total employees aged 50 or older, *re* is the total positions currently being recruited, and *ep* is the total positions established in the classification.	(5 vacant+5 retirement age employees-2 positions being recruited)/110 established positions = 7.2%	The PI calculation is used to prioritize classifications which are currently experiencing recruitment difficulties and/or high amount of employees at retirement age. A relatively high PI is a signal to look more closely at the particular recruitment issues in the classification and develop strategies to address the risks posed by recruitment difficulties and upcoming retirements.